



PROJECTED RIDERSHIP OF THE HOUSATONIC RAILROAD STUDY



Objectives

The objectives of the study were to determine:

- ▶ Residents' travel characteristics and preferred modes of transportation.
- ▶ NYC residents' reasons for travel to northwestern CT and Berkshire County, MA.
- ▶ Experience and satisfaction with train travel.
- ▶ Interest in Housatonic Railroad's proposed passenger train.



Methodology

- ▶ Market Street Research conducted an online survey of 2,567 respondents, including:
 - 2,316 residents of NYC.
 - 251 residents of Litchfield and Berkshire counties.
- ▶ NYC residents were screened to ensure that they have traveled to Berkshire or Litchfield County in the past year.
- ▶ Residents of Berkshire and Litchfield counties were screened to ensure that they have traveled to NYC in the past year.
- ▶ Respondents belong to an online panel operated by e-Rewards Market Research.



Methodology

- ▶ All surveys were completed from 6/10-29/2010.
- ▶ The response rate for the survey was 12.9%.
- ▶ We weighted the data by calculating the total eligible population in each area based upon the percentage of residents in each area that were eligible to participate in the survey.
- ▶ The error rate for the study is ± 1.1 to 1.9 percentage points.
- ▶ The margin of error information should be interpreted cautiously because the sample is a convenience sample.



CHARACTERISTICS OF RESPONDENTS



Characteristics of Respondents

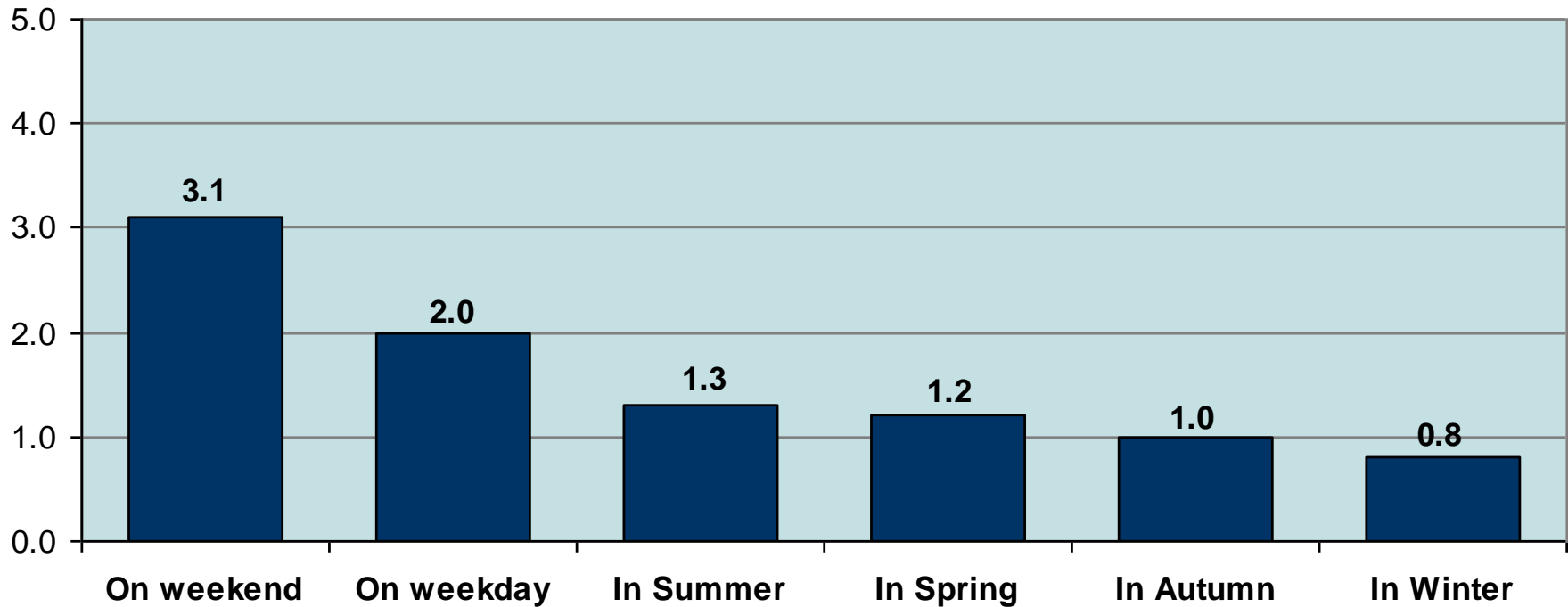
- ▶ 63.4% of respondents are women.
- ▶ Respondents' median age is about 36 years old.
- ▶ 82.6% of respondents are employed.
- ▶ Respondents' median household income for 2009 was about \$79,800.
- ▶ 92.3% of respondents have a driver's license.
- ▶ 60.2% of respondents own a car.



TRAVEL CHARACTERISTICS

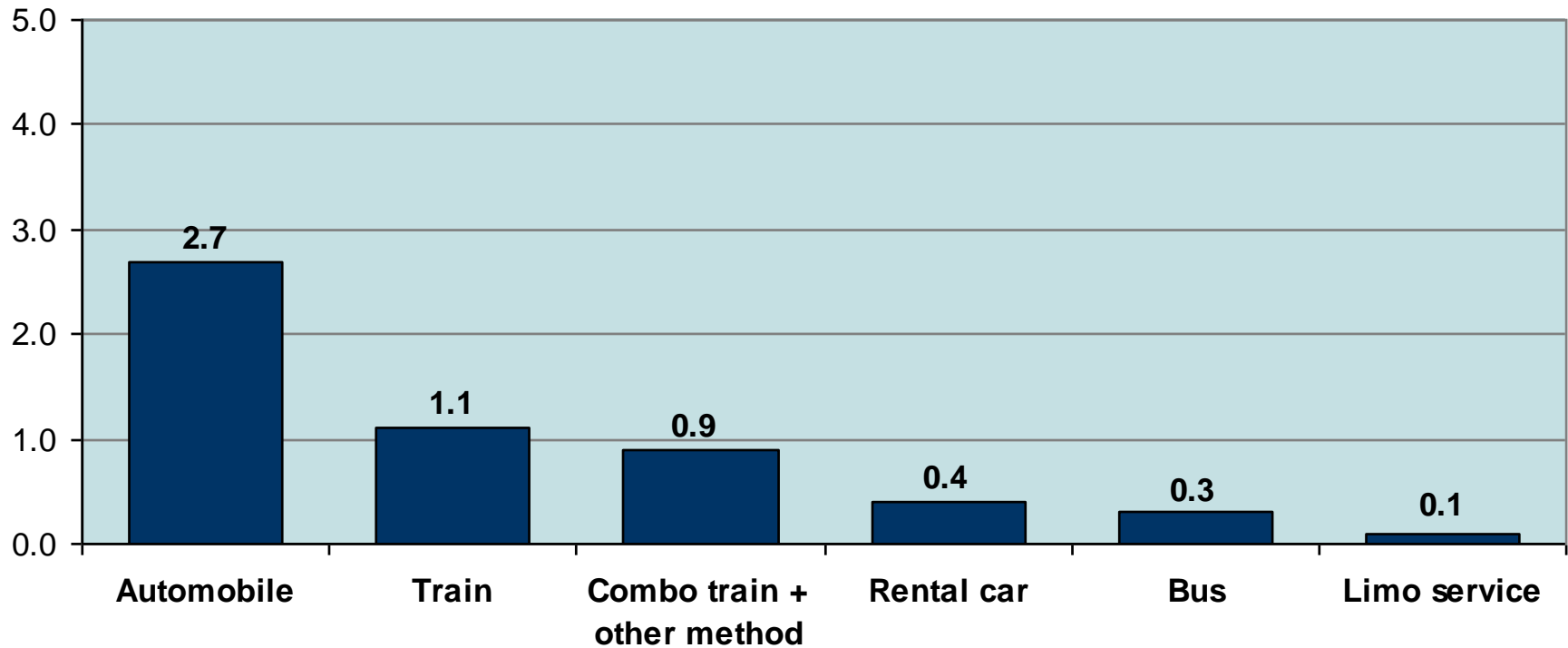


Average Number of Trips to NYC or Northwestern CT/Berkshire County in Past Year



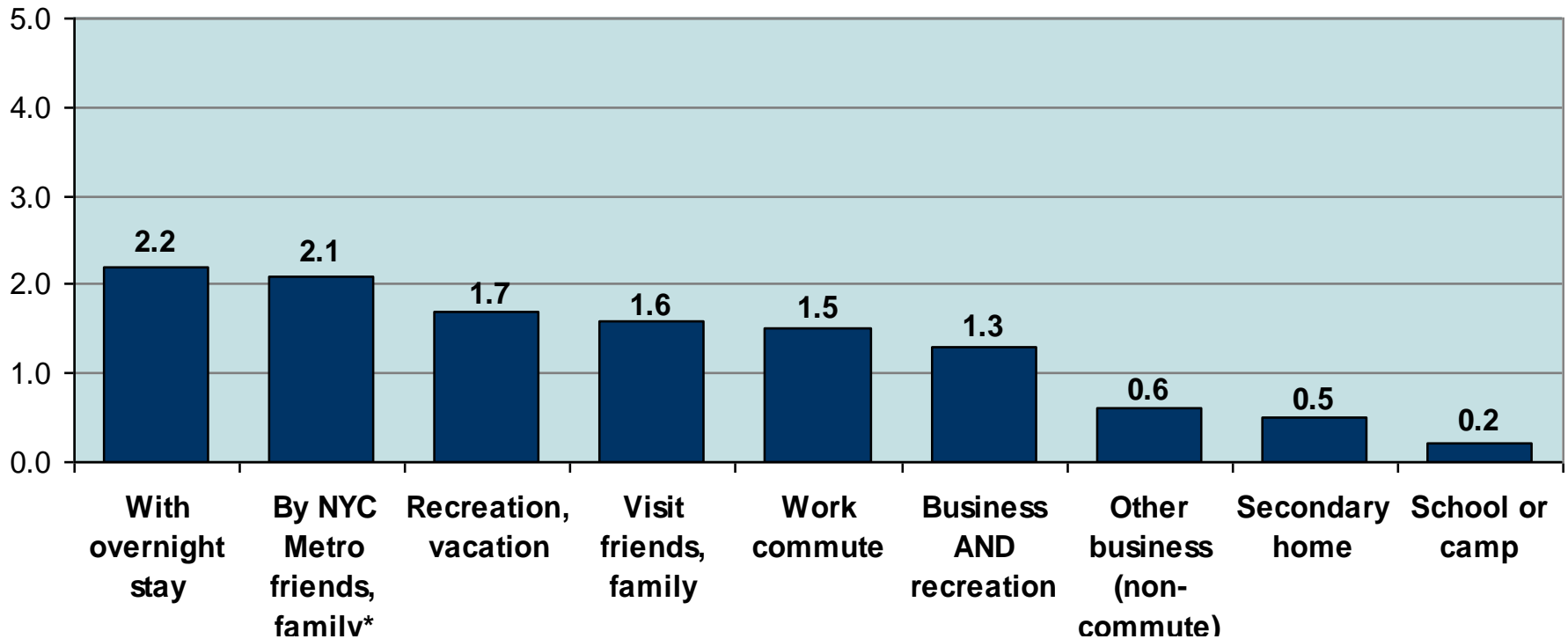


Average Number of Trips to NYC or Northwestern CT/Berkshire County by Specific Transportation Methods in Past Year





Average Number of Trips to NYC or Northwestern CT/Berkshire County for Specific Reasons in Past Year



* Asked only of residents of Berkshire County, MA and Litchfield County, CT (N=204).

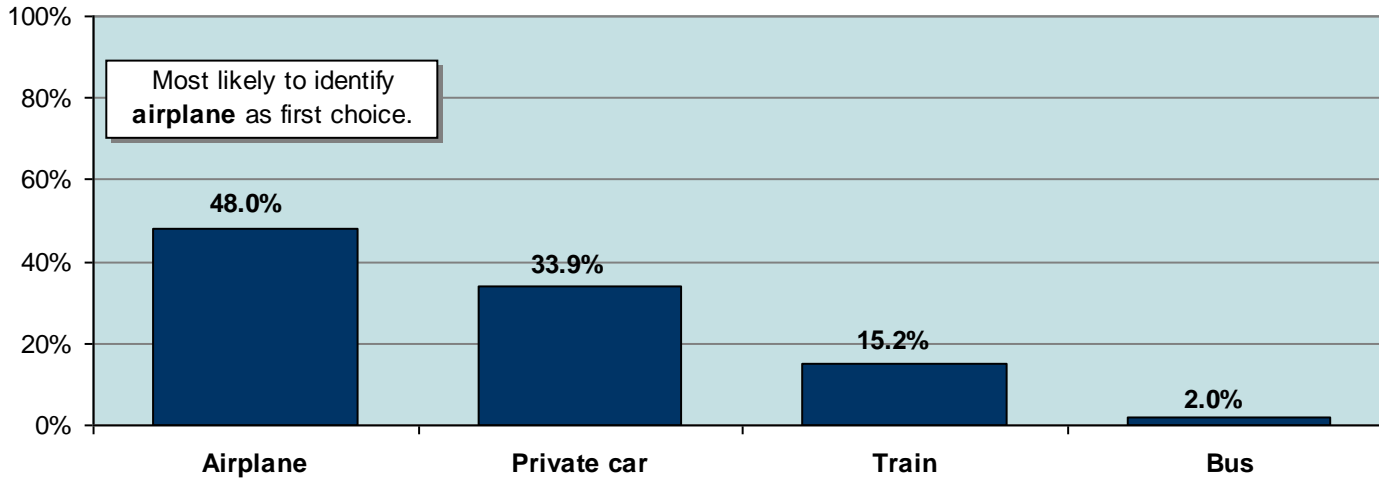


PREFERENCES FOR MODE OF TRANSPORTATION

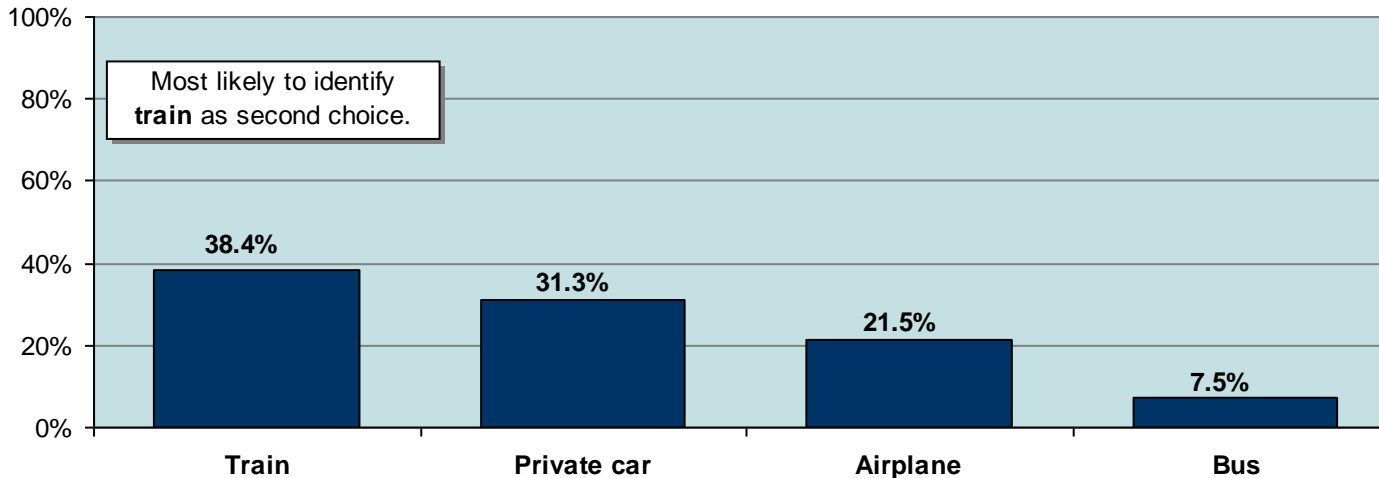


Preferences for Mode of Transportation

First Choice for Travel for Trips of Three Hours or More



Second Choice for Travel for Trips of Three Hours or More

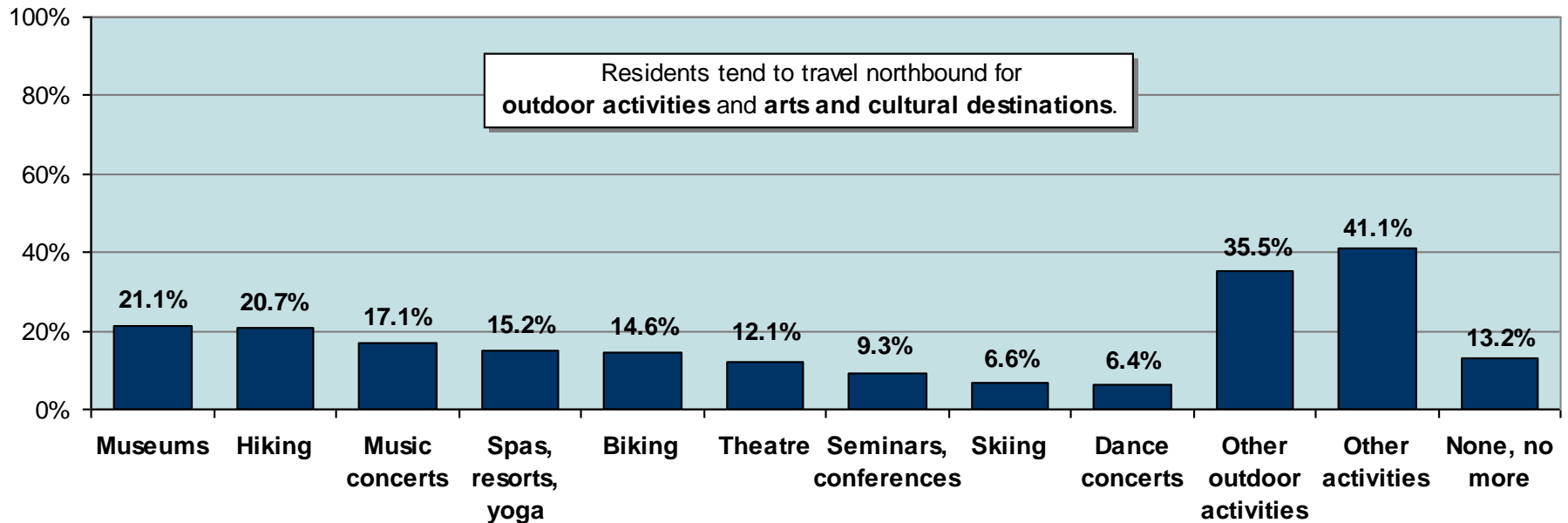




MAJOR REASONS FOR TRAVEL TO NORTHWESTERN CT AND BERKSHIRE COUNTY



Major Activities or Attractions for Travel Northbound

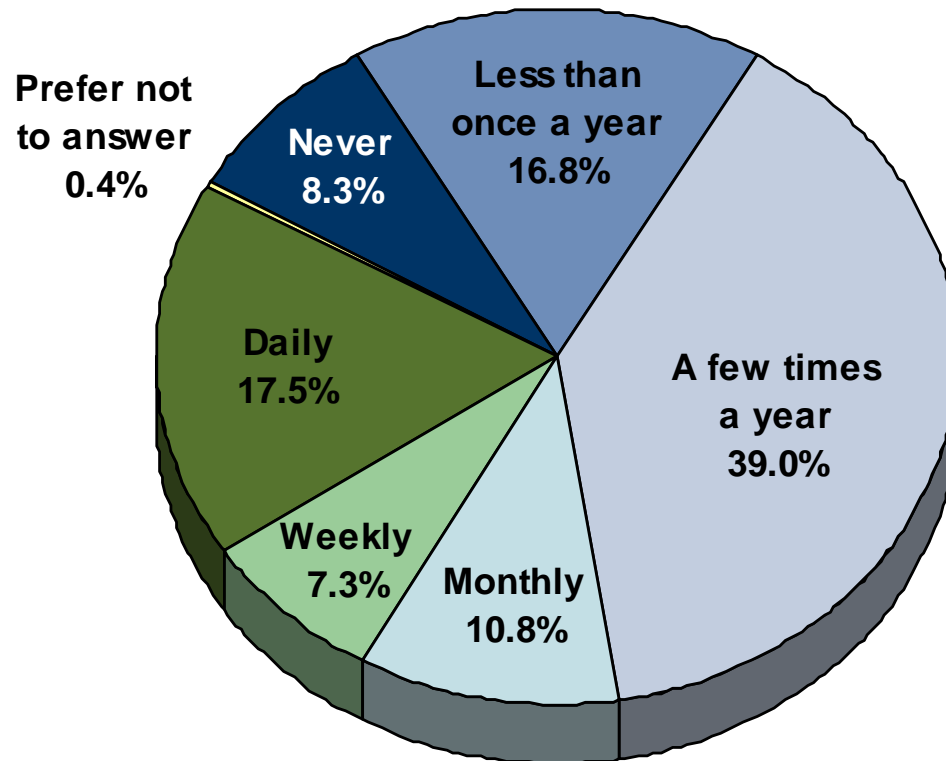




EXPERIENCE AND SATISFACTION WITH TRAIN TRAVEL OVERALL

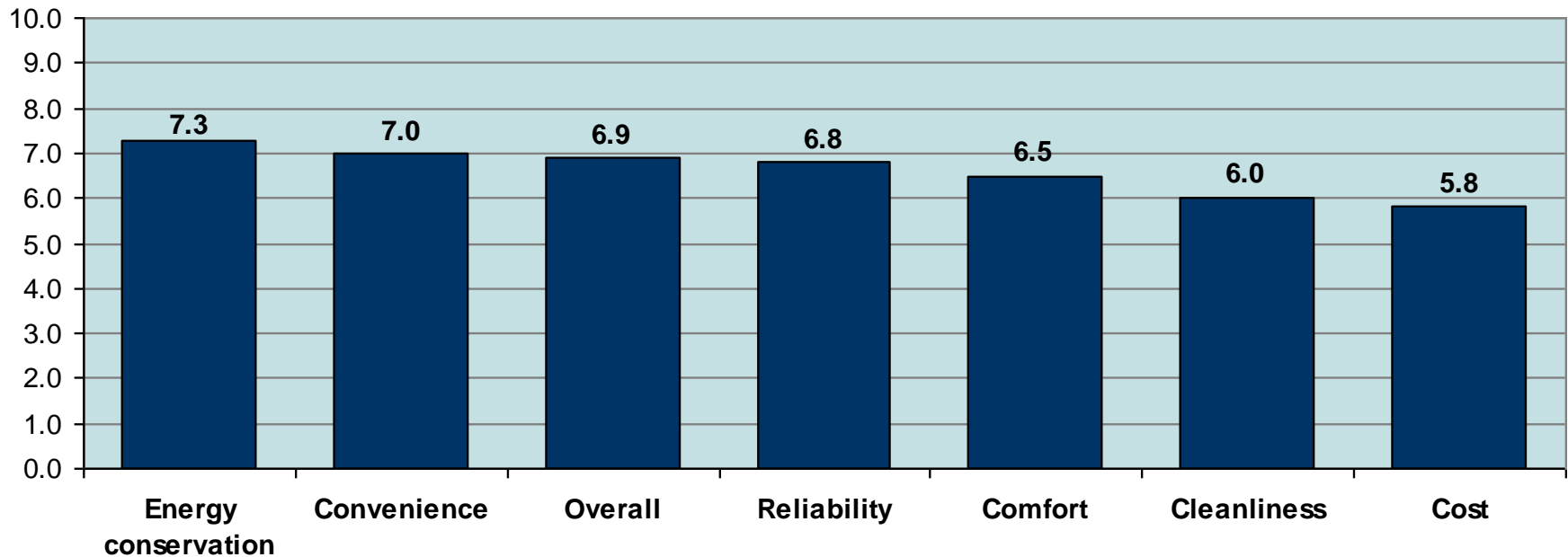


Frequency of Travel by Train





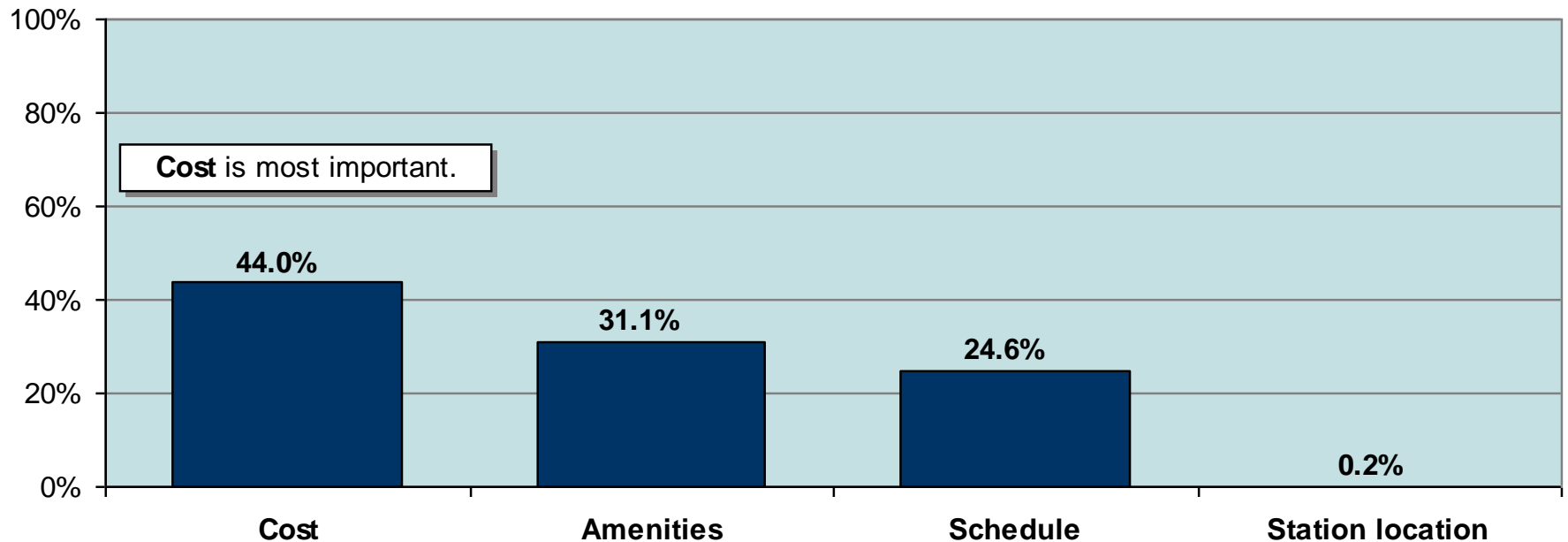
Rating of Aspects of Train Travel*



* Asked of residents who have traveled by train (N=2,354).

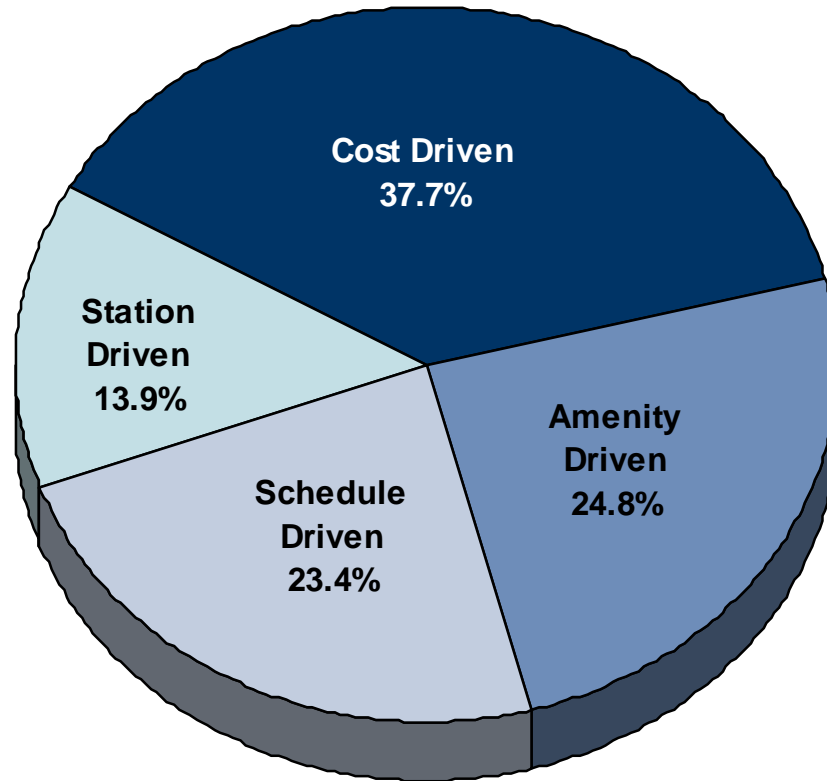


Relative Importance of Specific Factors in Likelihood of Taking a Train Between NYC and Litchfield/Berkshire County





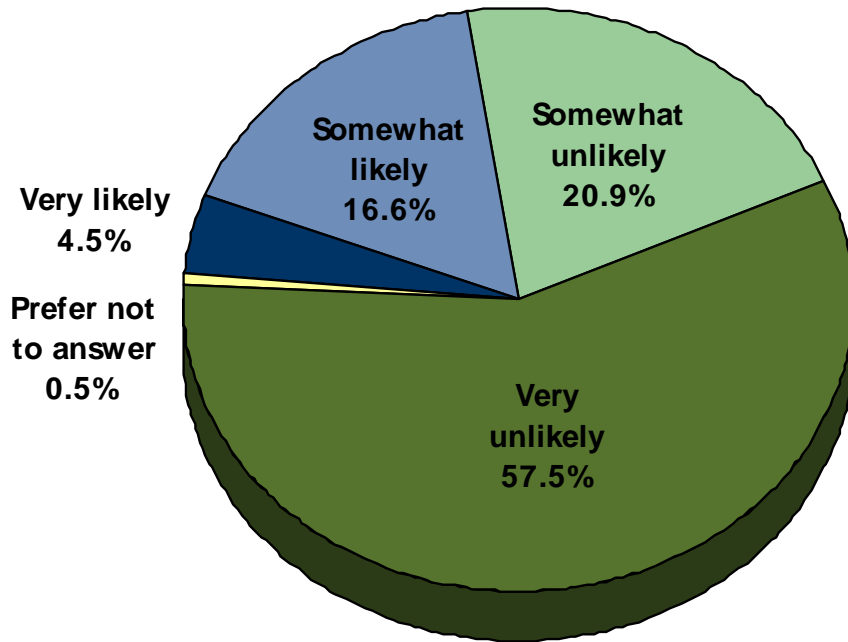
Market Segments for Train Travel



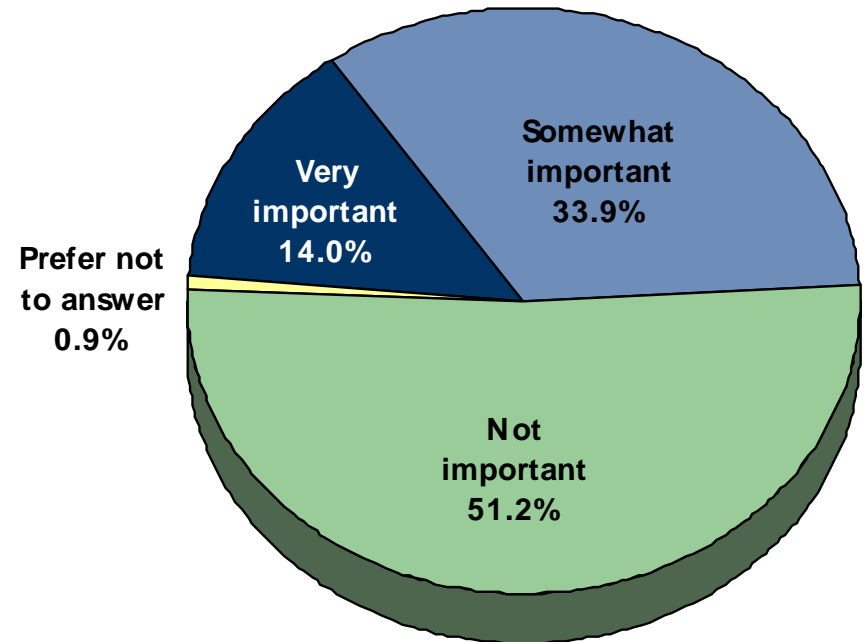


Interest in Specific Services and Options

Likelihood of Purchasing Business Class



Importance of Allowing Bicycles on Train*

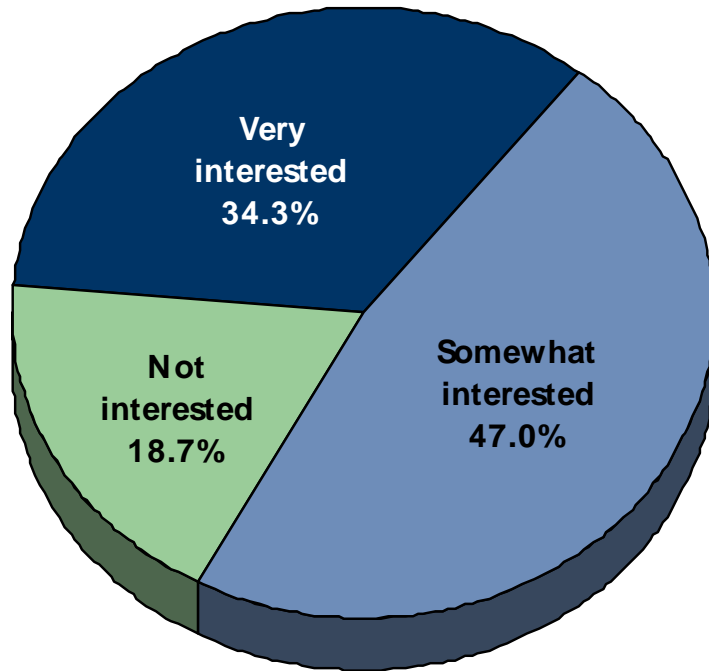


* Asked only of Northbound residents (N=2,363).

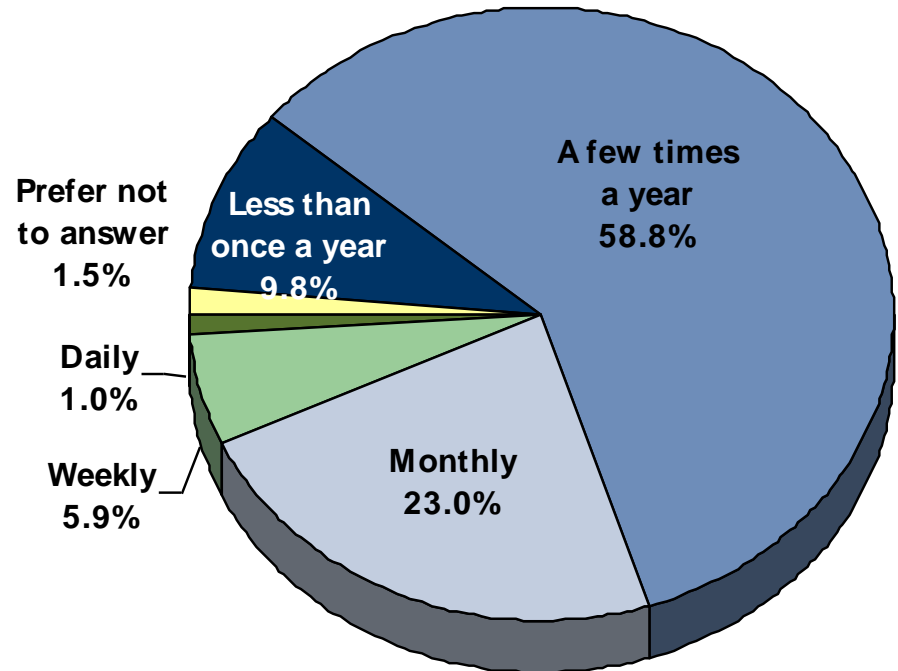


Shorter Train Trips in Berkshire County and Northwestern CT

Interest in Shorter Train Trips in Berkshire County and Northwest Connecticut*



Frequency of Train Trips in Berkshire County and Northwest Connecticut**

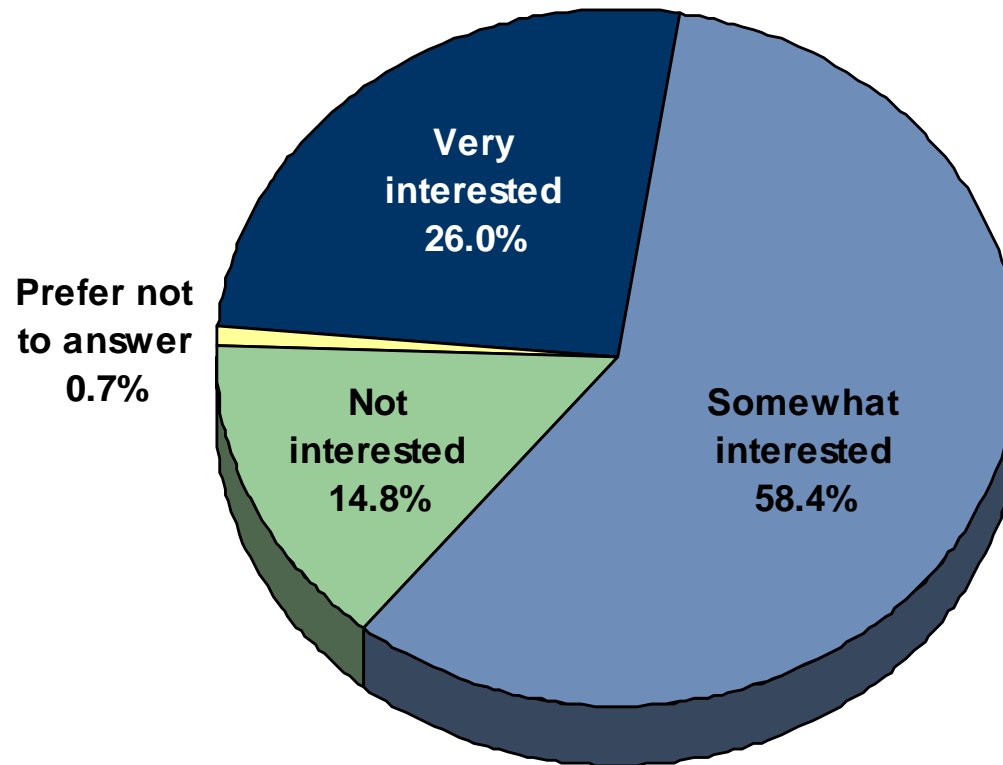


* Asked only of Southbound residents (N=204).

** Asked only of Southbound residents interested in shorter train trips (N=166).

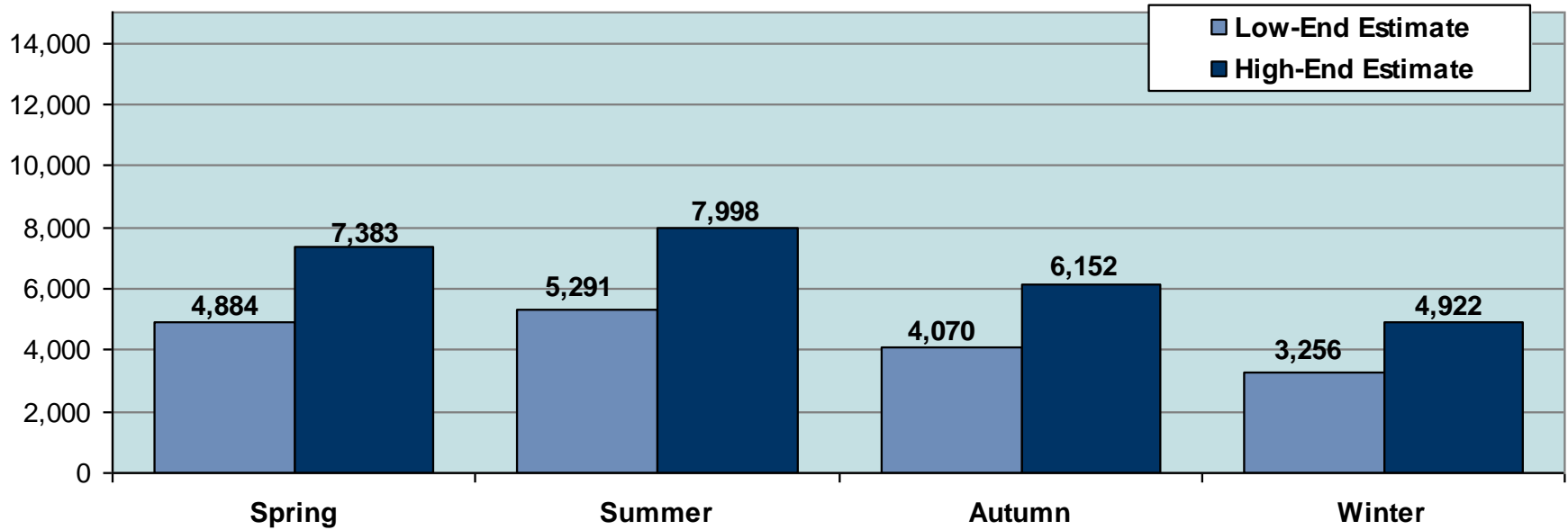


Interest in Train Travel Between New York City and Northwestern Connecticut and the Berkshires





Estimated Daily One-Way Tickets by Quarter





Major Reasons Interested in Train Between NYC and Northwestern CT and Berkshire County (N=2,081)

Preference for Train as Mode of Transportation:

- ▶ Ease of use, convenience (28.4%)
- ▶ Dislikes driving (20.3%)
- ▶ Comfortable, relaxing, can do other activities (14.9%)
- ▶ Other positive attributes (10.8%)

“It would provide a more convenient option. It would increase the probability of me visiting this location.”

“I don’t have a car, so the train is a great way for me to travel.”

“I could relax and look out the window, or read a book and listen to my music.”

Fondness for Destination:

- ▶ Enjoys area for getaways, activities, second home (21.9%)
- ▶ Visiting friends, family in area (10.5%)

“To get to cultural attractions (Mass MOCA, Clark Museum, Tanglewood, etc.), to see other sights, to take weekend getaways.”

“I would love to have access to the skiing areas in the Berkshires without needing to drive there, as well as the spa resorts and hiking areas in the spring and summer.”

“My husband and I love the Berkshires. We have many friends there, and are often invited to stay with them.”



Major Reasons Not Interested in Train Between NYC and Northwestern CT and Berkshire County (N=385)

Limited visits to area (34.3%)

“I only went there once, and don’t have a specific reason to go again.”

“I don’t travel there enough to warrant any need for the train.”

Preference for Other Mode of Transportation:

- ▶ Prefer driving (30.3%)
- ▶ Train less convenient (15.3%)
- ▶ Region best explored by car (12.9%)
- ▶ Other negative attributes (16.8%)

“I prefer to drive, and have control over what time I leave, and I do not find driving that expensive.”

“Leaving from Grand Central Station or Penn Station is not at all attractive to someone who lives in the Bronx. It is just not convenient at all.”

“I like to travel around Berkshire County by car as the area is rural. The places I visit are sometimes widely spaced apart so a car is needed for my travels. It makes no sense to take a train and then rent a car.”



What Would Train Line Have to Offer to Become an Attractive Option? (N=385)

Don't know, nothing (43.4%)

“Nothing would make it an attractive option to me.”

Inexpensive, competitive fares/parking (27.3%)

“Lower price. Combo deal with local hotel. Bonus tickets to local museum or attraction.”

“Free parking at local train stations.”

Specific transportation options at station (11.4%)

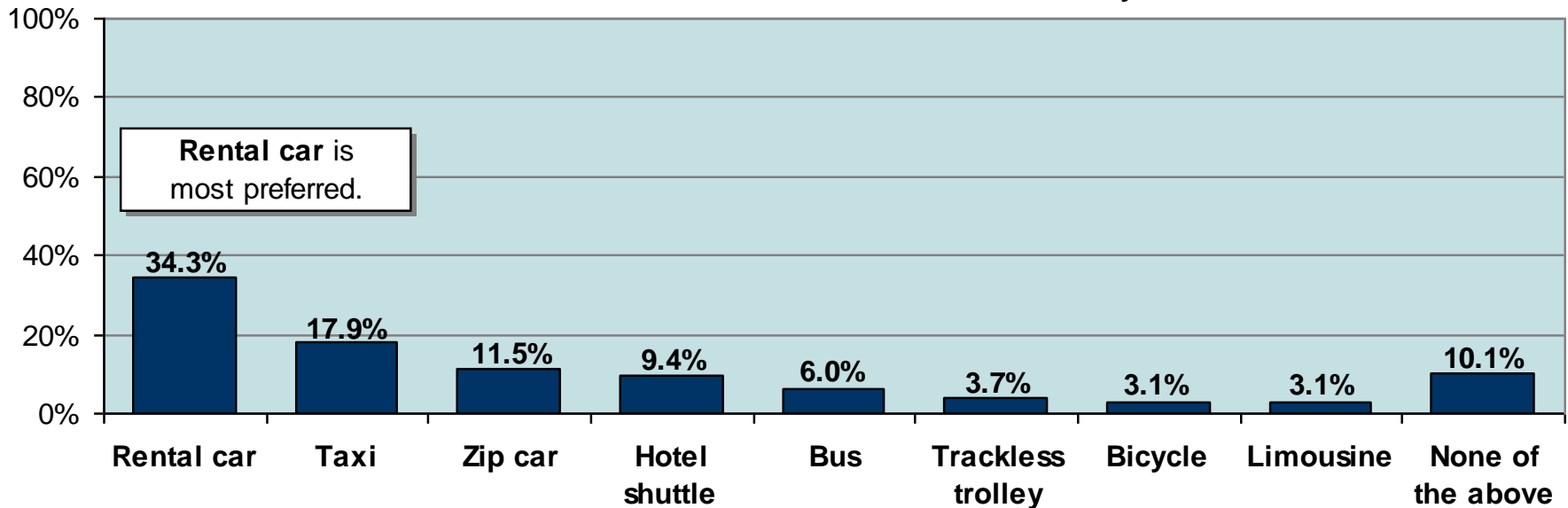
“Convenience of being near car rental once I’m up there.”

“Maybe if there was an extension or a connection in the Berkshires/Massachusetts or Northwestern Connecticut to a train heading to New Hampshire.”

“Shuttle to the train.”



Preferred Transportation After Arrival in Northwestern CT or Berkshire County*



* Asked only of Northbound residents (N=2,363).

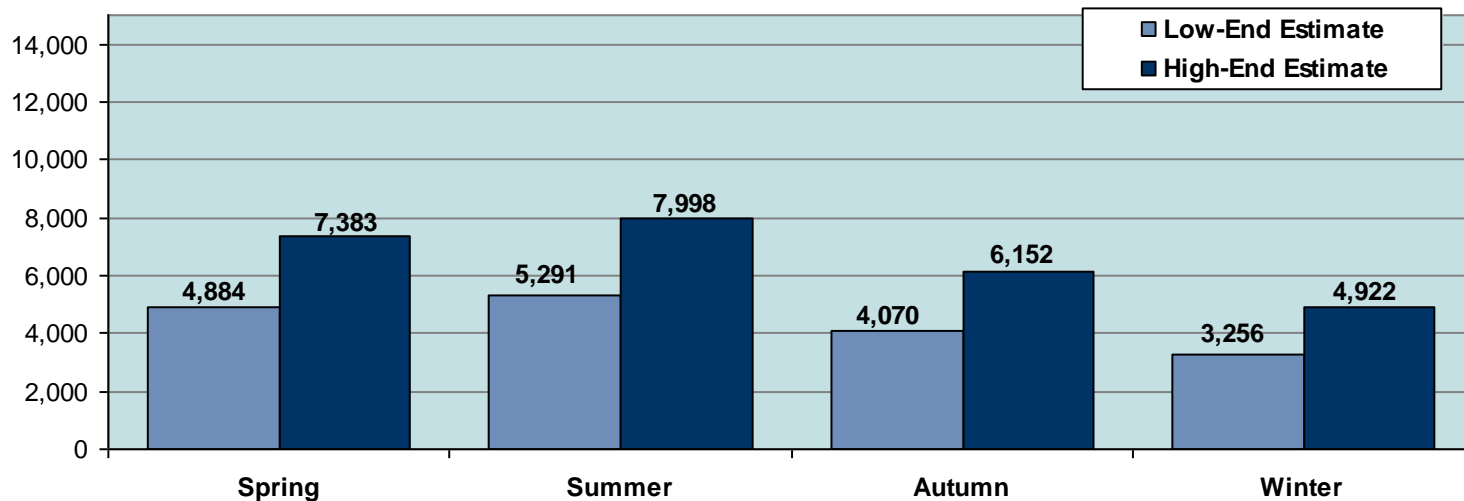


SUMMARY AND RECOMMENDATIONS



Summary

- ▶ There is interest among residents in NYC and northwestern CT and Berkshire County, MA in a train that would travel between these areas.
- ▶ About one in four residents who currently travel between those two areas are highly interested in the proposed train line.
- ▶ Ridership would be largest during the summer months and smallest during the winter months.





Summary (cont.)

- ▶ Currently, residents are most likely to travel between these areas on the weekends, using a car.
- ▶ Residents generally travel between these areas for recreation and vacations or to visit with friends and family.
- ▶ Residents generally stay overnight when traveling between these areas.
- ▶ NYC residents mostly mentioned traveling northbound for outdoor activities and for arts and cultural destinations.
- ▶ Residents have a positive attitude toward train travel in general.



Summary (cont.)

- ▶ Residents are most likely to feel positively about train travel's minimal impact on the environment, convenience, reliability, and comfort.
- ▶ Cost is the most important factor for residents when deciding whether to take a train between these areas.
- ▶ Southbound residents indicated fairly high interest in taking shorter train trips within northwestern CT and Berkshire County, MA.
- ▶ Northbound residents would like to see travel options for their stay available at or near the station of their arrival, with a clear preference for rental cars.



Recommendations

- ▶ Housatonic Railroad should consider introducing the train line with competitive pricing.
- ▶ It is also important for Housatonic Railroad to provide a high-quality experience for residents who use the proposed train line.
- ▶ Housatonic Railroad must be able to ensure reliable and convenient service.
- ▶ Housatonic Railroad may want to consider providing a wider range of amenities such as food, beverages, and free WiFi on the train.
- ▶ Housatonic Railroad may want to consider seasonal schedules, with more frequent trains available in the spring and summer months.



Recommendations (cont.)

- ▶ Housatonic Railroad should consider a more frequent schedule on the weekends.
- ▶ Housatonic Railroad may want to consider working with a rental car agency to provide rental car locations at station points in northwestern CT and Berkshire County, MA.